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LIBRARY GOALS AND OBJECTIVES: LITERATURE REVIEW

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I. PURPOSE AND PROCEDURE

This literature review is built upon a paradox -- while the vital importance of goals and objectives is widely accepted in the library literature, few libraries have well-structured and operationally useful formulations. Consequently, even fewer documentations exist on how librarians actually formulate effective goals and objectives. Likewise the academic community so far has offered few conceptual bases for the formulation process.

The scarcity of useful literature makes identification and assessment of what is available even more essential. Moreover, the considerable pressures on university and public library planning may soon produce positive contributions to the goal/objective setting process. These fiscal, social, and other pressures are elaborated upon later.

The search procedure has been to delve deeply into library planning and administration and range widely over a broad array of possibly helpful subjects such as education, business planning, systems analysis, budgeting, and the broad planning and methodological areas. The focus is upon university, public and special libraries with limited attention to school libraries. Emphasized are overall goals and objectives with very limited coverage of lower- level and state or other area-type goals. The aim is to be comprehensive but not exhaustive. Every effort, however, is made to include all significant viewpoints, approaches and contributions.

Most references are from 1960 to date, with the majority for the last five years. Significant contributions from the 1940's and 1950's are included. Monographs, periodicals, reports, theses, documents, and other forms are represented. It has, however, not been possible to explore the foreign literature except for representative contributions from England.

The major aim is to help two groups: first, those in university, public and special libraries involved in formulating overall goals and objectives; and secondly, those in the academic and/or professional community seeking to develop a conceptual foundation for goal and objective formulation.

II. COMMENTARY ON THE LITERATURE

The literature is relatively small -- while several hundred references have been scanned, only about 200 have been identified with some relevancy. Of the 141 references in the Bibliography, only a score deal with the formulation process in any substantive manner. While all attest to the importance of establishing goals and objectives, all too many offer only vague and generalized guidelines or concepts. Bone[14] presents the nearest to a case history of how a public library set about formulating its goals and objectives. McGrath[88] fully documents the planning experiences of Cornell University Library during the first year. Several theses are useful, especially the 1967 one of Kemper[78] on strategic planning. Wasserman's 1960 thesis attempted to develop an empirical basis for formulating public library goals but was largely exploratory.[128] Several theses -- Davis [35], Speller[114], and Young[133] -- are currently listed as being in-progress but are worthy of early review.

The literature clusters around these broad facets: definitions and contextual relationships; importance; contributing trends; surveys; difficulties of formulation; background factors; steps in formulation; and needs for future research. More has been written on goals and objectives for public libraries but much of it relates to broad societal-type goals and is accordingly, less useful for purposes here. Lack of consistency in terminology is a continuing problem -- the frequent interchange of "goal" and "objective" being the prime example.

In summary, the literature is modest in amount but widely scattered among many subject fields. It is usually within larger sources and often is either highly vague and generalized or highly specific to a particular function or situation. Practically no conceptual work has been reported while only a few chronicles exist of how libraries formulated goals and objectives. In spite of these limits, a review is appropriate because of the importance and increasing interest in the subject. First to be considered are some definitions.

III. DEFINITIONS

Goals and objectives are essential components of the planning and administrative processes. Ackoff carefully defines planning as a

> ... process that involves making and evaluating each of a set of interrelated decisions before action is required in a situation in which it is believed that unless action is taken, a desired future state is not likely to occur, and that if appropriate action is taken, the likelihood of a favorable outcome can be increased. 1(4)

Kemper defines the strategic planning process,

> ... the process of deciding on goals of the library, on changes in these goals, on the resources used to obtain these goals, and on the policies and strategies that are to govern the acquisition, use, and disposition of these resources. 78(216)

A "Total Planning Framework" is developed by Kemper in which he lists various types of objectives under strategic planning, operational planning, and task programming. For corporate planning, Ackoff distinguishes between tactical and strategic planning:

> 1. The longer the effect of a plan and the more difficult it is to reverse, the more strategic it is.
> 2. The more functions of an organization's activities are affected by a plan, the more strategic it is.
> 3. Tactical planning is concerned with selecting means by which to pursue specified goals. 1(4-5)

One of the earliest and most fundamental steps in planning is the definition of the organization's mission. Sellers defines mission as

> ... the broadest and most inclusive statement concerning its central and ongoing purpose. If a library does not understand its mission, its reason for existence, it cannot adequately set its objectives. 110(72)

Mission statement for Cornell University Libraries is ...

> To provide bibliographical, physical, and intellectual access to recorded knowledge and information consistent with the present and anticipated teaching and research responsibilities and social concerns of Cornell University.[88(136)]

An expansion of the mission statement is Beliefs or Guiding Principles. These further detail and specify organizational policy and ethics. Examples of these for Cornell are the following:

> Cornell University Libraries (CUL), both as an institution and as a community of individuals, is committed to excellence in its activities.
>
> CUL participates in cooperative library programs to support its mission.
>
> CUL subscribes to the spirit of the American Library Association Library Bill of Rights.[88(137)]

In a total planning effort such as Cornell's there may be additional steps before reaching goals and objectives themselves. These may include basic policies, strengths and weaknesses, challenges and opportunities, crucial problem areas, key result areas, and environmental factors. These are fully documented in the McGrath report and will not be expanded upon here.

Although there are no universally acceptable definitions of goals and objectives, Howard's statement is accepted as a working basis for this review:

> A goal is a statement of broad direction or intent that is general and timeless and is not concerned with a particular achievement within a specified time period. An objective is a desired accomplishment that can be measured within a given time and under specifiable conditions. The attainment of the objective advances the system toward a corresponding goal. [64(8-9)]

What the American Management Association terms "Continuing Objectives" is substantially "goals" and their "Specific Objectives" is "objectives" as used above:

> CONTINUING OBJECTIVES: Qualitative or quantitative statements of continuing intent of the organization which describe what results the enterprise wants to achieve and what it wants to become.
>
> SPECIFIC OBJECTIVES: Explicit quantitative statements, consistent with continuing objectives which specify the results to be achieved at a definite point in time and can be measured in terms of accomplishment. [88(103)]

Writers frequently reverse the above definitions of goals and objectives and goals become the more specific targets instead of the broader purposes for the organization. For example, Hamburg does this while differentiating between library standards and "objectives":

> Standards are neither objectives nor performance measures. Objectives are general statements of purpose and performance measures are a quantitative means of relating benefits (outputs) to costs (inputs). Library standards are either descriptive rules for 'proper' management or are quantitative rules for 'minimum' inputs of materials, personnel, and physical facilities. However, they are often considered to be objectives or performance measures or both.[56(123-4)]

Martin, it should be noted, has traced the evolution of library standards and suggested the need for a different type:

> The answer is a foundation of clear and explicit objectives and a functional prescription of what is needed to achieve objectives -- in other words, 'program' standards to go along with program budgeting.[91(175)]

Goals and objectives can be pursued by various means varying from the most specific (a course of action) through practises, procedures, and programs, to the most general (policies). Perhaps Goldhor and Wheeler have tied these together most succinctly:

> Unified goals lead to policies. Policies govern programs and procedures. Policies are general directions as to what activities shall be undertaken, on what scale, with what emphasis. Programs are the framework for activities, showing how in general the latter are to be planned, organized and managed. An activity is a specific operation or event undertaken or sponsored by the library. Procedures relate to operational details of activities. Standards are officially adopted or widely accepted measures by which to evaluate results; they may be derived from reliable data, or they may be rule-of-thumb dicta based on trial and experience.[47(2)]

Webster in his review of library policies, distinguishes between "program", "policy" and "procedures" and relates them to objectives:

> A program is a defined course of action taken to achieve objectives and includes an indication of required resources. The policy statement, then, gives guidance to be used in developing and following the course of action to reach these objectives. Procedures refer to the step-by-step details of execution of specific tasks set up as parts of the course of action within the policies.[129(2)]

IV. TYPES OF GOALS AND OBJECTIVES

Goals and objectives are of such a wide variety that they are best considered as a hierarchy. They range from the parent organization's goals through the overall goals of the entire library, program (or service) objectives, sub-program (or sub-service) objectives, and objectives for particular activities within a program or service.[25] Gross notes the importance of differentiating between personal and organizational goals:

> A personal goal is a future state that an individual desires for himself -- a definition akin to the psychological concept of motive. This meaning may be distinguished from what a particular person desires for the orgzanization as a whole, which may or may not correspond to the organization's group goals.[53(5)]

Gross goes on to develop this idea by stating:

> ... although an organizational goal is not necessarily the same thing as a personal goal or as a goal that a particular person desires for an organization, the nature of organizational goals is evident to some extent in the assertions of its members about what they think the organization's goals are.[53(6)]

Related to this is the warning of La dendorf --

> There is never any such thing as an organization; there are only groups of people engaged in a continuing process of organizing. This process involves constant procedural readjustments, as well as regular goal redefinition.[80A(275)]

Baker develops a model of a university library which divides goals into three broad types:

> User-oriented goals, defined according to the servicers' perceptions of the users needs.
> Funder-oriented goals, defined according to the servicers' perception of funders' criteria and constraints.
> Servicer-oriented goals, defined according to the needs and aspirations of the servicers.[7]

Fry distinguishes between internal and external objectives:

> ... in addition to officially stated missions... each ... will have developed either explicitly or implicitly its own objectives, tasks, sub-tasks, work units, etc., which it conceives to be necessary and appropriate to the fulfilling of the externally imposed requirements.[44]

Rayward distinguishes between real and ostensible goals:

> One may obtain through sampling and interview techniques some idea of what people at various levels in a library, or in many libraries, consider to be the most general goals of libraries; the future goals of their library; its immediate goals; the goals of their section in it and of their own professional activity. If these goals are described as ostensible or public goals, a third kind of goals may be described as real, private or even as system goals. These are the goals the library or groups of its personnel may be said actually to operate by at any given moment.[103(325)]

There are numerous other ways of classifying goals and objectives, only some of which can be listed here. A common one is by time frame such as immediate, short term, intermediate, and long term. Lowry, a special librarian, for example, comments,

> There are long-range goals and immediate goals, and in between there is a spectrum of variables as to what is desired and what is possible.[86]

Bowler contrasts specific and general goals -- the latter being "... broad in concept, spreading over a long and possibly indefinite period of time" [19(77)] and the former are short range (usually) with definite time limits and which "... should be established as needed to achieve the overall goals of the library." Ibid. Tangibility is another variable with the highly idealistic or intangible and the very concrete at opposite ends of the spectrum.

V. USES AND IMPORTANCE

Gregory summarizes the uses quite well:

> Objectives are essential in the establishment of specific goals, the preparation of budgets, and the development of policies. They provide the impetus for united effort in all units of an organization. They are the starting point for the preparation and maintenance of procedure manuals. They serve as directives for coordinated planning. They aid in restoring program balance at times when a single goal may be receiving undue emphasis. The statement of objectives is particularly useful to new administrators, staff, and trustees in getting an overview of the scope and direction of the institution's programs and activities.[51(56)]

Although Gregory writes from the viewpoint of public library cooperative systems, similar thoughts are often expressed by special and university librarians. For example, Galin comments,

> The determination of objectives is the starting point for the practise of management, and objectives and goals must be established in order to intelligently and effectively manage a scientific and technical information system.[45]

Rogers and Weber discuss the axiomatic importance of establishing goals for university libraries. They continue,

> ... there has to be in the midst of a sea of complex issues someone who harbors a general vision of where the library is headed and attempts to shape individual decisions towards a long-range target. Such a target may be the aspiration to move a third-rate library into the first rank in size and distinction with all that this implies in collections, buildings, and staff; or the target may simply be to maintain excellence in a library of distinction, a task that can be as difficult as striving for excellence if one is surrounded by complacency.[106(10)]

Clear identification of goals and objectives is of prime importance to the library budget and resource allocation function. Again, Rogers and Weber comment,

> In summary, the budgetary process relies to an extraordinary extent on objective information and well-defined and accepted goals. The library director who has developed his goals on a broad base that includes general university administrative agreement, who has taken the trouble to isolate ratios that are widely accepted or that can be honestly demonstrated on analogy with other libraries... is likely to get an even break for the library.[106(100)]

Gregory stresses the importance for public libraries:

> The librarian who stimulates a board to establish specific goals will be supported by trustees who know where they are going and are willing to defend their budget requests. ... The budget should be a plan to spend money to reach set goals that will carry out established objectives.[51(63)]

Implicit in meaningful goal and objective-setting activity is the need for structuring goals and objectives so that progress can be measured. Two special librarians state this well, first Wasserman:

> Without a clearly conceived rationale for its existence, the library in industry is on shaky ground. The library is only one of many agencies in a larger complex. As the total organization strives to achieve its goals, so the internal agencies reflect these goals in a program of activities aimed at achieving these total objectives. Until the objectives of any library are clearly and unequivocally set out, ultimate assessment or evaluation of performance is impossible.[126A(377-8)]

Next Ladendorf writes,

> Evaluation should be an attempt to measure institutional progress toward specified goals. These goals must be defined before good evaluative measures can be worked out. What most libraries seem to lack is middle level goals.[80A(274)]

She goes on to describe these as goals between those outlining the general mission and those which are "very specific, low level goals".

The problem of using most commonly stated goals and objectives for evaluation is described by Hamburg.[56] Wessel attempts to develop a methodology for evaluating library effectiveness by relating mission and objectives:

> SCORE analysis determines the extent to which the library administrator manages his resources to provide the combination of services and products which give optimum support to the library mission, goals, and objectives.[120c]

This report by Wessel is one of three produced by the John I.Thompson & Company with the purpose of developing evaluative criteria for the Army Technical Libraries.

Somewhat related to evaluation is the importance of goals and objectives to collection building. Bone writes,

> A final very fundamental problem in the past has been the lack of overall institutional objectives. Anyone who feels that an intelligent identification of the nature of the urban library collection can be made without understanding of the library's purpose will be misguided. Those who might be in the process of building a library collection,without first understanding what the collection is for, are merely squandering money which might better be spent on other urban priorities. In addition to providing overall direction to the institution, the objectives lay the groundwork for that cornerstone without which any collection building will suffer -- the acquisition policy.[13(630)]

If goals and objectives are to be met, the librarian must implement them with appropriate decisions. Not a great deal has been written on decision making in libraries. However, Bundy analyzes critical decisions made in libraries and remarks ...

> The cumulation of these decisions over a period of time, however, determines to a great extent the effectiveness of the library in meeting its goals; or, in fact, where its goals have never been precisely defined, these decisions account for the function which the library fulfills in the community.[23(15)]

Seldom mentioned in library literature but frequently in business and educational literature is improved staff motivation and morale resulting from participation in setting organizational goals. This is the MBO or Management-by-Objective thrust which is discussed briefly in the next section. The benefits of MBO are somewhat controversial at the present time, but perhaps its intelligent application may be one antidote to the tendency noted by Bundy for library departments to develop their own goals which conflict with other departments.[22](254) Dutton writes of the meaning and value of staff participation:

> What is meant by staff participation? It is essentially an active co-operation between manager and subordinates in the setting up and pursuit of agreed job-related objectives.
> The unit's overall long-term objectives within any larger organization will need to be determined initially, but once this has been done the medium term objectives and the short term improvement targets must come from the staff themselves.[40](115)

In addition to the preceding positive benefits of clear goals and objectives, there is the avoidance "benefit" of not allowing policies to become objectives by just evolving from practise rather than being established by the library administration. Closely related is "goal displacement",

> ... when an organization substitutes for its legitimate goal some other goal for which it was not created, or for which resources, were not allocated, or for which it is not known to serve.[131](9)

In summary, properly formulated and implemented goals and objectives can be of vital importance to library management, gaining public and staff support, library planning and budgeting, as well as in specific library functions such as acquisitions.

VI. CONTRIBUTING TRENDS

Program-Planning-and-Budgeting (P.P.B.)

Since about 1967 a number of libraries have been attempting to formulate goals and objectives as an essential part of the PPB system. Perhaps the below definition is as good as any of the many in the literature:

> The principal components of program budgeting, are a structure which categorizes the activities of an organization by their objectives and the programs for obtaining them; the use of formal analysis systematically to examine the costs and gains of programs and their alternatives; and control and reporting for implementing policy decisions and measuring progress toward their achievement.[21]

First applied on a large scale in the Department of Defense in the early 1960's, President Johnson in 1967 directed all civilian departments and Federal agencies to begin using PPB. There followed considerable efforts

to apply PPB to state and local governments including a rather rapid and widespread movement to apply the process to education. Hatry's survey of the status of PPB in local and state governments notes the lack of progress in operational measurement of objectives.[61] Although PPB ended as a formal requirement with the issuance of OMB Revised Circular No. A-11 on June 21, 1971, many of the essential planning techniques continued to be applied. A recent article by Schick assesses the current status of PPB and its prospects for the future.[108]

Although the rush to PPB was definitely slowed by 1970 and few libraries operate under a PPB system currently, the PPB movement contributed considerably to a planning climate for many libraries. Allen examines the key problems of applying PPB to the academic library environment and concludes,

> Basically, the difficulties stem from the fact that a large academic library is not a free standing structure but is dependent on a university or state parent for operational guidelines. The new staffing requirements are foreign to libraries. A foreign profession is introduced into a closely knit family that has been universally librarian. This in many cases, could be likened unto an unwanted in-law... 3(18)

Two other sources relating PPB to academic libraries are de Genaro[36] and Young[133]. Buckman provides a survey paper on the history, essential characteristics, contrasts with traditional budgeting methods, and studies and applications of PPB in university, national, and large public libraries.[21] Schofield has written a thoughtful statement on the problems of applying PPB to university libraries.[109]

The earlier and less critical literature includes the fifeteen reports resulting from the Institute on Program Planning and Budgeting Systems for Libraries held at Wayne State University, Detroit, in 1968. One of these by Burness is on the objective-setting process and is quoted extensively in Section 9 on formulation guidelines.[25] Howard[65] and Jenkins[70] write of the application of PPB to public libraries. A PPB workshop of the Santa Barbara High School District resulted in a report covering program goals and objectives for school libraries.[107] Bromberg provides some practical guidelines for beginners in applying PPB to libraries.[20] Summers places PPB into context from a budgetary viewpoint.[116]

Systems Analysis and Design/ Operations Research.

Parallel in many ways with PPB has been the increased use of systems design and analysis which often accompany library automation programs. The criticality of defining long-term goals is often emphasized, for example by Chapman:

> The next step, critical in planning and conducting this study, is the study staff becoming fully conversant with the library's overall goals in relation to the problems to be studied. Goals are those factors that the management of the library determines to be important for accomplishment;... 32(487)

Bellomy has likewise noted the keystone position of objectives in systems:

> A system is an assemblage of interdependent things and ideas necessary to achieve a set of related objectives. It is characterized by inputs which are processed to produce the outputs required to achieve specified objectives.[9](1122)

Burns[26], Herner[62], Chamis[30], and King[79] discuss the role of goal and objective-setting in systems design and analysis.

Although not dealing with the goal and objective formulation process per se, the largely operations research (OR) work of the Cambridge University Library Management Research Unit[99], the Project for Evaluating the Benefits from University Libraries (PEBUL) at the University of Durham [39], and the University of Lancaster Library systems analysis effort[82] all illustrate an important trend in library planning efforts.

Library Legislation.

Some literature has resulted from the Library Services & Construction Act Amendments of 1970. This law stipulated that every state library agency must submit a 'long-range program' by July 1, 1972, in support of its request for federal funds. This means

> ... a comprehensive five-year program which identifies a state's library needs and sets forth the activities to be taken toward meeting the identified needs... (p.2-3 of of LSCA Act)

Many of these state plans are now becoming available through ERIC; the one for California is included as a sample.[28]

The future prospects for this program appear dim since the Nixon Administration plans elimination of all federal aid to libraries for Fiscal Year 1974. What planning funds, if any, become available through the "Better Schools Act of 1973" is highly uncertain.[113]

Financial Pressures.

Sellers describes funding problems during the early 1970's:

> Often faced with frozen or shrinking budgets, physical facilities in need of updating or expansion, and constantly spiraling labor and material costs, many library administrators are being forced by circumstances to deeply analyze and evaluate their operations.[110](70)

This pressure to cut costs and improve efficiency cuts across university, public as well as special libraries. This trend is superimposed upon the long run trend of increasing complexity of libraries -- larger collections, cooperative systems, centralization, and greater variety of services. Both trends mean added management problems wherein clarification of objectives becomes ever more critical. Evidence is in a survey by the Association of Research Library's Office of University Library Management Studies in September 1972 -- of eighty-nine libraries contacted...

> Seventeen have, or are in the process of establishing, a distinct administrative officer with major responsibilities for coordinating and promoting long-range planning.[6(2)]

Holley in his survey of urban university libraries noted similar trends:

> The institution of academic planning on many campuses, the encouragement of more precise definitions of objectives and goals by higher education boards, and the prospect of a levelling off of support in the seventies, have suggested to many librarians the need for a new look at the way libraries are organized and managed.[63(178)]

Social Pressures.

The frequent social pressures and frustrations of the 1960's forced many libraries to reassess institutional goals and objectives. A number of writers such as Wasserman[126], Bone[14], and Bundy[24] see a critical need for a major shift in objectives and goals of public libraries if they are to survive as viable institutions. Another school of thought, however, is that is isn't so much the goals that need changing but rather a changed emphasis upon their implementation.[51(53)] At a more specific level, Lipsman's book on library service to the disadvantaged devotes a full chapter to "Program Objectives and Implementation".[85]

In the university field, McAnally and Downs describe the increasingly "hot seat" position of university library directors because of pressures from the president's office, library staff, faculty and students, with a declining ability to meet user needs, lack of cohesive planning, and an institutional inability to accomodate change.[87]

Additional Trends.

Harrigan has attempted to carry over the educational accountability concept to libraries.[58] There has been a vast amount written on management-by-objective (MBO)[29,67] but as noted before, not much has been directly applied to libraries. Dutton is one example, however.[40] There has been limited carry-over to libraries from organizational analysis, for example see Rayward[103] and Swanson[117].

Summary: Contributing Trends.

PPB, though now in eclipse, has contributed considerably to a planning climate in libraries. The same can be said for systems analysis and design, but the long run trend is up because of the increasing complexity of library operations. Library legislation has peaked in its influence because of the revenue sharing trend. Social pressures are quieter than during the 1960's but may resurface. Financial pressures are probably the strongest force making for goal and objective-setting.

VII. GENERAL SURVEYS

Libraries are creatures of the society in which they function and will survive only so long as they satisfy that society's needs. It is, therefore, necessary to understand goals and objectives of libraries at the broadest level since individual libraries engage in setting their goals and objectives in this context. Only major contributions can be covered, however.

The considerable historical changes in public library objectives are noted by Bowler[19(78-9)] and Goldhor[47] and Wheeler . The Public Library Inquiry, 1950, general report had a chapter on "The Library Faith and Library Objectives". Their approach was by three routes --

> First was a review of library history to locate the librarian's traditional sense of purpose. Second was a synthesis of the statements of public library objectives promulgated in recent years by official library leadership. This combined statement of current objectives was verified by submitting it to a representative sample of librarians and was found to reflect a consensus of librarian opinion. Third a survey of the whole contemporary machinery of public communication of which the library is a part in order to see what role the public library might most appropriately play in the light of what is being done by other agencies.[83(222)]

The recent study by the ALA's Public Library Association headed by Martin summarizes the above public library objectives -- general definition of objectives, fields of knowledge and interest to which the public library should devote its resources, and the library means for attaining the library objectives.[88A(12-13)] The Martin report also comments upon the dichotomy of thinking about the usefulness of societal goals:

> Critics of public libraries emphasize the necessity for clearly defined universal goals and deplore the vagueness and haphazard formulation of present existing objectives. Others say universal goals are not practical or desirable, except in the broadest sense. Instead, each library must develop its own goals which are determined by the needs of the particular community.[88A(31)]

Hamburg found numerous recorded statements identifying public library objectives. He used thirteen sources and developed a list of twenty-seven grouped under informal educational objectives and three under educational objectives.[57] Morey analyzed returns from a questionnaire which listed an array of possible goals and charted the most commonly accepted goals of public libraries in ranked order while goals mentioned only once were categorized separately.[94]

In the special library field, several surveys are noteworthy. Wessel requested mission statements from eighty-eight Army libraries with seventy-two responses received, and sixty-nine used for analysis.[120b(28)] Galin, in his STINFO survey, did a field check of what librarians said their objectives were compared with what the literature stated and concluded that

there was a close match.[45(137)] A survey of public libraries, however, found a divergence between what public librarians said their library goals were and their real operating goals:

> Librarians perceived the public library as providing service to all people irrespective of income, education, occupation, size of community, etc., but user statistics, however, show that a small minority of all people actively use public libraries. And this minority is not a representative cross section of people in our society.[98]

Although no similar listing was found for university libraries, the recent Booz, Allen, and Hamilton report on university libraries took note of the common failure of such libraries to clearly define program areas and objectives.[16] In its recent review of planning activities in academic and research libraries, the Association of Research Libraries (ARL) said,

> Emerging research library planning practises are still to a large extent, in an experimental stage, involving efforts to apply proven management methods to academic situations.[6]

Hamburg did survey university library objectives but without listing them and concluded that all lacked the explicitness required to be "... of direct assistance to management in planning and decision-making for libraries".[57(Pt.1,ix)]

In summary, although a number of surveys and official statements have been made about goals and objectives, the great majority of libraries operate without any formalized ones. This is well stated by Kemper:

> ... library objectives tend to be informally approved and lack criteria for evaluation. The process of long-range forecasting is not highly developed; typical library plans are made for a three-to a six-year period, and key assumptions and objectives are generally not circulated to the institutional organization during the planning process. The evaluation of results of library planning was found to be done on an informal basis. Relatively few libraries use strategic plans as guidelines for operational activities of the library.[77]

VIII. FORMULATION -- DIFFICULTIES AND BACKGROUND FACTORS

One author has stated that no step in the procedure to apply PPB to libraries has caused more difficulty than the first step of defining goals and objectives.[116(1177)] Wasserman has summarized the overall difficulties in this way,

> The process of deciding on goals is not simple. It can be a painstaking and difficult one. It may uncover basic differences of attitude, stir up fundamental disagreements, and unleash violent winds of internecine rivalry. Yet out of this process can come forth compromise based upon understanding... [127(114)]

The same author in his Ph. D. thesis lists eight barriers to the formulation of public library goals:

1. The dilemma of the public library serving "educacational" versus "recreational" community needs and interests.
2. Ambivalence in the attitudes of public librarians as between the quality standards proposed by their national professional body and the practical day-to-day demands of library users.
3. The pluralistic composition and the pluralistic attitudes of the public library's clientele.
4. The pluralistic patterns of library service officially prescribed by the national professional associations.
5. The absence of a philosophy of public library service which might reinforce the position of each library.
6. The dilemma of a public service institution which seeks to be all things to all men.
7. The public library has no line structural relationship to aid in identifying its objectives.
8. The potential strategic dysfunction of a singly clearly articulated set of institutional objectives.[128]

Among the key problems is how to obtain common agreement among the major stakeholders in the library -- parent organizational officials, professional staff, library users, etc. The Bundy article noted earlier is worthy of review.[22] Although written primarily for urban planners, Young points out some reasons for differences:

> Briefly, differences -- in spite of commonly held goals -- arise when: a)there is a lack of agreement as to whether a goal should be regarded as a means or end; b)there is a lack of agreement as to the end-goals which a mean-goal serves; or c) there is a lack of agreement as to the relative value that should be assigned to the end-goal. Other difficulties arise, of course, when goals are not commonly held or goals are basically antagonistic to other goals. In the latter case further controversy can arise between those who do not hold the antagonized goals in common or when there is a lack of universal realization that this situation exists.[134 (79)]

There must be later evaluation if goals and objectives are to have real meaning. This requires that goals and objectives be stated in explicit terms. They must be real and operable and this takes careful analysis. Wasserman has stated,

> Exactly what is the level, extent, and type of informational need to be met -- does it include research, fact-finding, recreation? [126A(378)]

Closely related to the explicitness difficulty is the ever-present problem of interrelatedness of objectives and goals and the frequent conflict between them. Hamburg noted this in his survey of public and university library goal and objective statements.[56] Assuming this barrier is removed, there still remains the critical problem of ranking in order of importance or priority. Librarians usually find it necessary to pursue several goals simultaneously.

The necessity for keying library goals and objectives to parent institutional objectives has been mentioned in connection with PPB, but this possible barrier is worth emphasizing with this quote from Munn:

> For some reason, academic librarians insist on writing about academic libraries as if they were semi-autonomous units with very considerable freedom to establish their goals. No academic library can long pursue policies of any consequence which are contrary to those of the parent institution. In the final analysis, it is the university, not its library, which decides how much and what kind of cooperation it will support.[96]

To the foregoing might be added any number of additional barriers to the formulation process. However, only one other will be mentioned -- the human tendency to prefer talking about specific operating details or particular requirements of the moment rather than thinking in terms of longer range goals.

Background Factors.

As Lowry states, "Goals don't exist in isolation and neither do information centers".[86(164)] Therefore, it is appropriate to provide listings of background factors important in the goal and objective formulation process. Kemper has noted the overall need to look at the three major systems -- external environmental, institutional, and internal --

> 1. The external environmental system sets forth the broad social, cultural, political, competitive, and economic parameters within which the library must operate.
> 2. The institutional organizational system sets forth the organizational structure, competitive relationships for the particular institution in which the library operates.
> 3. The internal organizational system indicates the library organizational structure, objectives and policies, and operational relationships which make the library a unique system.[78(40-1)]

On a more specific level, several authors have listed major background factors determining the nature of library goals and objectives. Howard, for example, shows the following in order of importance:

> 1. Financial support.
> 2. Governmental and legal conditions.
> 3. Ideals and philosophy of the librarian.
> 4. Organization.
> 5. Other institutions.
> 6. Nature of the clientele.[66(327)]

Graham lists the following background factors:

1. The parent organization and its characteristics.
2. The place of the library in the organization.
3. Management's concept of the library function.
4. The personnel using the library.
5. Library facilities, staff, and budget.[48(367-8)]

Bowler shows these:

1. Library law.
2. Financial support.
3. Population.
4. Schools, churches, and cultural facilities.
5. Business and industry.
6. Climate and natural resources.
7. Geographic factors.
8. Factors within the library.[19(77-8)]

Gregory recognizes increasing social concerns in her listing:

1. Laws and government.
2. Available or potential funding.
3. Population characteristics
4. Problems of a mobile, demanding, and confused society.
5. Economic and cultural gaps.
6. Quality of human relations in the community.
7. Barriers in communication and cooperation.
8. Citizen response to shifts in morality and mores.
9. Change in educational methods and curriculum content.
10. Existence or lack of opportunity for continuing education.
11. Rights of majorities and minorities in age of high taxes, group pressures, and fears for the future. [51(5)]

From these listings, it is important to enlarge upon one key factor -- the values and attitudes of the librarian. Although not a great deal has been written upon exactly how these librarian characteristics are reflected in library goals and objectives, they undoubtedly can have the profoundest impact upon the direction in which the library moves and the way it operates. Goldhor and Wheeler write,

> Goals, or objectives, should derive from many sources: from the librarian's knowledge of present trends and problems in society; from his awareness of what goes on, nationally, in education and in cultural and intellectual fields; and from national and local library leaders who have the background of discussion, debate, observation and experience. [47(4)]

The proper role of the public library director has been expressed in this way by Joyce:

> He will not only study and formulate policies for the board to weigh, but will define long-range goals and their alternatives. He will know how to keep his own

> and the board's eye off the minutiae of library operations and on the realization of these goals. He will pursue no goal merely because it is there, but will search constantly for new and more valuable objectives.[73(3388)]

In summary, there are a number of background factors as well as barriers to keep in mind before and during the process of formulating goals and objectives. Certainly all through the process, the librarian must remind himself of the purpose, philosophy, and needs of the library and its parent institution.

IX. FORMULATION GUIDELINES

The following guidelines attempt to structure the major points of the literature of the "how-to-do-it" variety. The major source tapped is Burness' paper presented to the Institute on Program Planning and Budgeting Systems for Libraries at Wayne State University in 1968.[25] These assume an operating library but some authors have considered goals and objectives for libraries and information centers being planned -- for example, see Graham[49], Knox[80], Taylor[118], and Wasserman[125]. Obviously the following should not be considered definitive in any sense; their application undoubtedly will vary widely depending upon the individual library situation. They are listed here for a convenient preview:

1. State mission.
2. Write set of guiding principles.
3. Identify and articulate real objectives.
4. Be specific, distinctive, and brief.
5. Use commonly understood terms.
6. Develop meaningful measures of expected accomplishments.
7. Make goals and objectives challenging.
8. Get involvement.
9. Determine objectives for all library levels.
10. Balance set of goals and objectives.
11. Establish order of priority.
12. Produce draft, discuss and then redraft.
13. Agree, recommend and obtain approval.
14. Publish and publicize.
15. Put objectives to practical use.
16. Review and re-examine periodically.
17. Modify as necessary.

1. State mission.

"Mission" has been defined and illustrated in Section III on Definitions. It is important to remember to make it the most inclusive statement possible. Although Ackoff is referring to objectives below, the same idea holds good for the mission statement --

> The higher the level at which objectives are formulated, the more inclusive they are likely to be. We can better evaluate the carpenter's behavior if in addition to knowing that he is trying to build a frame for a door, we also know that he is trying to build a house.[1(34-5)]

2. Write set of guiding principles.

These also have been defined in Section III on Definitions.

3. Real objectives. Identify and articulate real ones.

They should have operational meaning or some way of measuring the degree of success in achieving the goal or objective.

> The objectives should not be regarded as just 'public relations' statements but as critical guides for future actions.[25]

> Tangible goals should be a guide to action and sufficiently explicit to suggest a certain type of activity. They should be helpful to decision-making and not pious statements.[55]

4. Be specific, distinctive and brief.

> The set of objectives should be specific and distinctive to the particular situation, program or service.[25]

5. Use commonly understood terms.

> Terms should be valid, defined clearly, integrated logically with one another, and used consistently and uniformly and used throughout the organization and the process.[25(65)]

6. Develop meaningful measures of expected accomplishments.

> Tangible goals should suggest tools to measure and control effectiveness.[55(1574)]

7. Make goals and objectives challenging.

> The goals should be challenging. It is the goals which create organizational vitality. It is necessary to distinguish between the possible and the impossible, but to be willing to get close to the latter.[55(1574)]

8. Get involvement.

The librarian must take the lead, but others can and should be involved.

> In some instances, library committees have been employed. In other instances, the goals have been developed out of extended discussions between information personnel and management officials. ... The more widespread the involvement of as many of the organization interested personnel, the more widespread will be the understanding of the aims of the information program, once established.[127(114)]

> If the administration has not told people where the library is going, and hopefully allowed them to take part in this decision-making process, then the administration should not be surprised if the people have done some thinking for themselves as to the library's future.[110(71)]

9. Determine objectives for all library levels.

This includes overall, program, sub-program and activities.

> Just as the library's objectives must contribute to the achievement of the objectives of the parent organization, so too must the objectives of the major library programs contribute to the achievement of the overall library objective. When objectives for program elements are identified these too, must contribute to the objectives of the programs, and so forth on down to the lowest level of activity in the program. In other words, there is a hierarchy of objectives, although they are seldom discussed in these terms.[8]

Bellomy goes on to show a portion of this hierarchal arrangement for a university library. Galin takes a somewhat more flexible position concerning the importance of observing the "unity of objective" between the library and its parent organization --

> It is not necessary that higher level objectives have been clearly defined, but only that the objectives of the STINFO do not materially contradict important company or research objectives.[45(136)]

10. Balance set of goals and objectives.

> The whole set of goals should make sense. With rare exceptions, there is no single, overriding goal. Goals should be balanced in relation to one another.[55(1574)]

> ... it should be remembered that goals should be realistic and timely; realistic in the sense that they may be desirable from the standpoint of the community served or of being achievable within a reasonable planning projection, such as a generation. Objectives which fail to meet these two standards will lead to repeated failure in achievement, with attendant frustration and even controversy.[95(358)]

11. Establish order of priority.

> The widest range of objectives is possible in any special library; hence the need to derive priorities and to translate them into resource allocation terms. Since it may not be possible to achieve every goal simultaneously, such ranking and relative weighting is the only rational course.[125(411)]

12. Produce draft, discuss and then redraft.

> Formalizing aims and objectives has a surprising way of clarifying them -- even for the library and its staff.[123(68)]

> It is the function, indeed it is the responsibility, of their information specialist to develop a written survey and plan of action, formulated through consultation within the organization and its management and among representatives of various divisions, so that agreement can be achieved upon the organization's requirements for information service.[127(114)]

> It is important to get a maximum of understanding -- preferably of agreement also, but most vitally to gain understanding. If there are semantic "hang-ups", try to resolve them or compromise them. If there are issues, real issues of substance, face them -- either work them out or find a basis for recommended decision on how they should be dealt with.[25(71)]

13. Agree, recommend and obtain approval.

> Make it some sort of official action that is a practical guide for the planning, programming and budgeting that is going to govern the resources in total magnitude and the allocation of resources, whatever type they may be -- let the objectives be before you with the maximum of agreement and determination.[25(72)]

14. Publish and publicize.

> They should be distributed somehow, in memorandum form or otherwise. Do include them in annual reports and brochures -- not in a trivial public relations way, but as real indications of what our organization intends to do. By all means, let the staff know -- after they have participated they are entitled to know what has been concluded.[25(73-4)]

> The university librarian should articulate in writing the role of the library in support of the university's academic program. He also should explore the responsibility of the library for the continued development of established areas of library excellence and its responsibilities as an information resource for the community, state, region and nation.[16(46)]

A contrasting viewpoint on the wisdom of publicizing university library objectives is the following:

When it is borne in mind that the significant inputs to the library plan are gleaned, almost through an undercover intelligence network, from such circumstantial sources as hearsay, as things unsaid rather than said, as raised eyebrows and twitching lips, and from remarks made in absolute confidence by one of two opposing factions of the community -- faculty and administration -- that are essentially locked in endless combat, it would be foolhardy for the librarian to lay his plan on the line publicly or even to permit so little as a glimpse of it by either faculty or administration. 75(212)

15. Put objectives to practical use.

It is good discipline to insist on people doing what they ought to have been doing all along: really decide what it is you intend to accomplish and then gear your planning, develop your program, and produce your budgets to do what you intend to accomplish -- not something else, and not just volume statements of 'more' specifics about what you're going to buy, etc. 25(75)

There are many opportunities and occasions when conscious reference to objectives may be the point that tips an administrative or operating decision in one direction rather than another. We should make operating decisions not just by a whim of the moment but by conscious reference to what we intend to accomplish and examination of what that means for tomorrow or next week or beyond. Ibid.

16. Review and re-examine periodically.

Look at the objectives again: are they current? Do they really express what we intend to accomplish? Have events overtaken them? Has the situation changed? Do we have a new set of circumstances? 25(75-6)

It should be compared with current developments elsewhere, but not distorted by temporary fads and enthusiasms. 47(4)

Nor must any blueprint for action once evolved become a fixed and rigid mandate. Periodic review of goals and program are as essential as the original concern about goals, lest the program become stale and obsolete. 127(114-15)

17. Modify as necessary.

The objectives will not be carved in stone and they should not become static. They are the product of the best effort, but they should not be immutable.

> This means change or modification with a good reason, not for whimsical reasons, e.g. 'We just don't like it.' -- but we should change when there is good reason.[25](76)

The foregoing seventeen guidelines are intended as an exploratory checklist for librarians facing the task of formulating goals and objectives. It would be helpful to have case histories of librarians using such a list or similar ones , and from such experiences to hopefully develop a more definitive approach to goal and objective-setting.

Two documentations do exist and are worthy of careful study. Bone has described the formulation process at the Memphis Public Library and Information Center. He shows the steps of forming an original committee, summarizes their deliberations, acceptance by the head librarian, presentation to the Library Board, and final approval after some revisions. The included objective statement shows, "Library Functions to be Served" on one side and "Groups of the Public to be Served" across from it. The implementation of the objectives is being carried out on a regular basis and is documented in committee minutes made available to the author.[93]

The best documented case in the university field is that of Cornell University Libraries at Ithaca, New York. Funded by the Council on Library Resources and assisted by the American Management Association, Cornell's planning experience of the first year has recently appeared as a report by McGrath.[88] This report describes, chronicles, and evaluates experience in developing a planning team, a dynamic long-range strategic plan, participative management, and the planning process itself. Such planning documents as "Continuing Objectives", "Specific Objectives", "Guiding Principles", "Basic Policies", "Levels of Priority", "Strategies", and "Structure of the Continuing Planning Process" are included. Sellers, the Planning and Budget Officer at Cornell, has explained his planning philosophy and technique in a recent article.[110]

The University of Illinois Library recently issued a statement of its goals and objectives.[69] The library sets the following major goals:

1. Effective organization and administration.
2. Adequate financial support.
3. Continued rational development of the collections.
4. Strong staffing and staff development.
5. Quality and efficiency of operation.
6. Effective services to users.
7. Adequate physical facilities.

Objectives designed to assist in achieving the above goals are then described ...

> Although some rather specific statements are included, the objectives set forth in this document tend to involve general statements of principles and philosophy and are intended to provide the base from which future, more specific decisions can be made. There is deliberate avoidance of formulae, time-tables and other attempts at quantification.

Another library statement worthy of careful attention is the "Long Range Plans for Tulsa City-County Library".[122] Included are statements on purposes, goals, and priorities as well as goals for Tulsa.

Additional references may help other types of librarians formulate goals and objectives. A model for state library objectives is the Booz, Allen & Hamilton study for Hawaii.[15] Although many library surveys are weak in establishing goals and objectives [12], the Martin survey of the Chicago Public Library is an outstanding exception and merits careful study by those formulating goals and objectives in major urban libraries.[90] School libraries contemplating a PPB approach may wish to review the experience at Santa Barbara.[107] An article on the John Deere Company Library includes a list of its goals and objectives.[4]

X. SUMMARY AND CONCLUSIONS

The literature of library goals and objectives is now relatively small and unsophisticated, but the prospects are good for increasingly substantive contributions that will be useful for evaluative and other planning purposes. The basis for this assessment lies in the "pressure points" described in the "Contributing Trends" section -- especially the continued financial pressures on all types of libraries. Increasingly, university libraries -- and perhaps large public libraries -- will set up distinct long-range planning functions. From these will hopefully be developed more refined procedures to establish goals and objectives which will fill a more useful and realistic function.

A possible nucleus for this ferment is the work of the Management Studies Office administered by the Association of Research Libraries (ARL) and funded by the Council on Library Resources. The stated mission of this office is to ...

> assist university research libraries in effectively serving the academic and research community through sound management of the resources available to them.[5]

Perhaps its most important current task is the Management Review and Analysis Program the intent of which is ...

> to help librarians better achieve unit objectives. ... a clearer, more precise view of the objectives of the library and the relationship of its program objectives to the constraints present in any university environment. Ibid.

The first issue of this group's "ARL Management Supplement", December 1972, takes the theme of planning activities in academic and research libraries. Objectives are mentioned frequently within a discussion of four areas:

1. The library in university planning.
2. New organization and staffing patterns.
3. Procedures and methods for securing planning data.
4. Experience with long-range planning methodology.[6]

Less pronounced in the literature is sign of ferment among public libraries. Nevertheless, there is renewed interest since the release of the Public Library Association's A STRATEGY FOR PUBLIC LIBRARY CHANGE: PROPOSED PUBLIC LIBRARY GOALS-FEASIBILITY STUDY.[88A] Four task forces are at work to implement the report's recommendations.

XI. FURTHER RESEARCH RECOMMENDATIONS

Of first importance is a basic manual describing goal and objective setting procedures as now understood. This could follow almost exactly the outline of the recent ARL publication on library policies.[129] Such a manual would provide a framework for the formulation, implementation, and communication of goals and objectives.

Apparently libraries have lagged far behind schools in involving staff, community, and other interested stakeholders in the goal-setting process. Perhaps librarians need to remind themselves -- "In cutting a stone, each sees himself building the cathedral".[115] Certainly the educational literature offers some helpful insights on how to involve staff and possibly community. This can result in a more highly motivated input of ideas and enthusiastic acceptance of the final statement. One such report attempts to marry PPB with some organizational development concepts in order to improve the motivational climate.[102] Another author describes various methods of securing staff input to goals and objectives -- e.g., traditional conference, boss-subordinate conference, goal confrontation, and use of the Delphi method.[97] The last method replaces the "... committee with a sequence of individual interrogations and interspersed feedback of information". Borko has recently used this technique in identifying research targets in library education.[17]

Not enough appears on how the values of library managers affect the goal and objective formulation process. Steiner has written of businessmen values and their effect on objective-setting and defines values as "something like attitudes but more fixed, ingrained and stable in nature"[115] Just how do librarians' attitudes and values affect the formulation, adoption, and implementation processes?

A continuing major need is for research to develop appropriate and meaningful evaluative criteria and methods. Hamburg's research points out the impracticality of utilizing present public and university library objective statements if evaluation is to be conducted. However, what are the practical implications of using Hamburg's concept of "document exposure time"

In summary, the prospects for more attention to the library goal and objective formulation process appear promising, but much research and wider experience followed with careful documentations and evaluations will be required before the state-of-the-art reaches the level now available in some schools and businesses. In ending it is well to remind ourselves of the limits to research:

> In the final analysis, objective determination will rest upon value assumptions which defy scientific justification. The ultimate goals of public policy are dictated by wisdom and scientific method can not distinguish appropriate or inappropriate values. But research may prove to be the only feasible means for reconciling the conflicting value positions and while it may not be expected to provide answers directly, it can be

expected to contribute to better understanding of alternatives by offering the factual empirical data on which such decisions may be based.[128(135)]

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